

**CALIFORNIA DEPARTMENT OF TRANSPORTATION  
POSITION DUTY STATEMENT**

<b>CLASSIFICATION TITLE</b> Personnel Technician I	<b>DIVISION/OFFICE/BRANCH</b> Human Resources Office of Statewide Liaison Services	
<b>WORKING TITLE</b> District Transactions Liaison	<b>POSITION NUMBER</b>	<b>EFFECTIVE DATE</b>

**As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.**

**GENERAL STATEMENT:** Under direction of the Branch Chief, a Staff Services Manager I in the Division of Human Resources, the District Transactions Liaison serves as the liaison for personnel/payroll issues between district office employees and the Division of Human Resources (DHR), Office of Transactions Services and Records, and Office of Hiring and Examination Services; disseminates personnel/payroll information and receives and distributes personnel-related documents to designated staff. Provides support to the district staff in the areas of pay, benefits, and examinations. As appropriate, provides assistance or refers employee questions and/or problems pertaining to a variety of personnel-related issues to DHR (HQ) or a lead analyst (District Human Resources Liaison). The District Transactions Liaison demonstrates a positive attitude, a commitment to providing quality service that is accurate, timely and exceeds our customers' expectations, and maintains complete confidentiality.

**TYPICAL DUTIES**

**Essential Tasks**

- 35% Provides support to employees, supervisors, and managers in responding to questions related to benefits, pay and leave balances, retirement, and any other benefit-related personnel matter. Performs the necessary research required to resolve questions on these issues. If necessary, refers technical questions to DHR or the District Human Resources Liaison (HRL). Ensures that all personnel documents (i.e., health, dental, vision, etc.) are completed accurately and submitted to the assigned Personnel Specialist by no later than the following business day from the date the document was received. Assists employees with the completion of necessary forms, answers questions pertaining to forms, benefits, and payroll, and provides information on all benefit-related programs available to State employees.
- 25% Conducts New Employee Orientation for all new employees, excluding Maintenance field employees, and sends completed documents to HQ Transactions Unit for processing. The District Transactions Liaison (TL) works closely with hiring supervisors, the DHR Hiring Analyst, and/or RAO (Maintenance) to process new hire documents, which includes completing I-9 documents and approving medical evaluations. All

information pertaining to hiring documents will be kept confidential and is the responsibility of the District TL to ensure that new employees present the proper documents permitting them to secure legal employment with the State of California.

- 15% Provides support at the District level to the DHR Examination Program coordinating local exams and serving as an Assistant Proctor or receptionist, and is responsible for the security and confidentiality of exam-related materials. As directed, works with District HRL and/or Exam Analyst to coordinate local exams and secure rooms/facilities needed to administer examinations. The District TL distributes and posts examination bulletins throughout the District Office field locations. As a point of contact, may be required to communicate with the public regarding the examination process and answer general questions related to the civil service examination process (i.e., exam format, minimum qualifications, etc.). The District TL is expected to comply with all written guidelines and procedures set forth by the DHR Examination Program regarding the administration and security of exams. The District TL may be required to travel to other district offices as needed to assist with other DHR functions.
- 10% Provides brochures, literature, and appropriate forms detailing various personnel pay and benefit programs. Receives, distributes, and tracks a variety of personnel-related documents, such as Individual Development Plan (IDP), Probationary Reports, Merit Salary Adjustments, range change approvals, Notice of Personnel Actions, and health, dental, and vision benefit forms, etc. As necessary, orders benefit, payroll, and miscellaneous forms and maintains an adequate supply for the District. As a representative of the Department and DHR, attends job fairs as needed and provides information and answers questions related to State employment. On an annual basis, the District TL facilitates the District Health Fair which requires securing approval from district management and contacting various vendors to participate in distributing health-related information to district employees.
- 10% On behalf of District employees and hiring supervisors coordinates with DHR (HQ) the access and review of a copy of an individual employee's Official Personnel File (OPF). The District TL is responsible for the receipt, security, and return and/or destruction (shred) of confidential information in accordance with established Departmental and Division policies and procedures.

Marginal Tasks

- 5% As directed by either the Branch Chief or the HRL, serves Notices of Adverse Action either in person or by mail in accordance with Department guidelines. The District TL is expected to provide assistance on special projects/assignments, and complete other duties as assigned.

**SUPERVISION EXERCISED**

None.

## **KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS**

The District Transactions Liaison (TL) must have knowledge of basic grammar, spelling, punctuation, and modern English usage. The incumbent must have the ability to interpret and edit written material; write effectively; analyze written and numerical data accurately, and follow oral and written instructions. In addition, s/he must have the ability to express ideas in a clear, concise manner either orally or in writing. Knowledge of various personnel-related principles and practices, and examination policies and procedures is essential. The incumbent must possess the ability to accept increasing responsibility and complete all tasks/assignments accurately and thoroughly; develop and maintain cooperative working relationships with all levels of staff; and, determine and apply a plan of action in evaluating situations. The incumbent should have basic computer skills and be familiar with Outlook (email) and the Internet. It is essential that the District TL be able to maintain confidentiality, skillfully organize and maintain different types of information, and accurately manage multiple tasks and handle time sensitive material within designated timeframes. As a member of DHR, all employees are expected to remain flexible and be willing to adjust work schedules as needed in order to meet operational needs.

## **CONSEQUENCE OF ERROR/RESPONSIBILITY FOR DECISIONS**

The District TL, under direction of the supervisor, is responsible for communicating accurate information to employees regarding pay and benefits, as well as assisting them submit the appropriate documents. Erroneous information and/or untimely submission of documents could result in the loss and/or delay of an employee's pay and/or benefits. Failure to provide proper information to employees could result in financial liability and/or discredit to the department and division. The District TL must ensure that they can make informed decisions regarding their pay and benefits. Erroneous decision making in the examination process could result in compromising the integrity of the exam, as well as create a financial liability and/or discredit to the department and division.

The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the Division of Human Resources (DHR) reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

## **PUBLIC AND INTERNAL CONTACTS**

The District TL will confer with all levels Caltrans management and staff at the District and Headquarters levels, as well as members of the general public. S/he may also consult with staff from various control agencies for guidance and/or assistance.

## **PHYSICAL, MENTAL AND EMOTIONAL REQUIREMENTS**

The District TL may be required to sit for long periods of time, using a keyboard, mouse, and video display terminal. In addition, there may be instances that require prolonged standing. At times, the District TL may be required to move boxes of training materials, examination materials, supplies, printouts and/or other boxes of personnel documents. The District TL may be required to discuss highly sensitive and emotional issues with employees on a regular basis, or in the case of a deceased or seriously ill employee, s/he may be required to console and advise employee's family members during difficult, emotional times. The District TL will be required to deal with a high volume of paperwork and handle a number of multi-tasking assignments, which will require meeting multiple deadlines in order to complete the requirements of the job efficiently and effectively. The District TL will also be required to prioritize work assignments while under high levels of stress and/or pressure.

## **WORK ENVIRONMENT**

While at the base of operation, employees will work in a climate-controlled office at workstations within cubicles under artificial lighting. Incumbent may also be required to travel to and from Southern California District Offices and Headquarters, and work outdoors where s/he may be exposed to dirt, noise, uneven surfaces, and/or extreme cold or heat.

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I have read, understand and can perform the duties listed above. If you believe you may require accommodation, please discuss this with the hiring supervisor.

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**Employee**

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**Date**

I have discussed and provided a copy of this duty statement to the employee named above.

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**Supervisor**

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**Date**